



Indiana Pro Bono Commission
One Indiana Square, Suite 530
Indianapolis, IN 46204

Indiana Bar Foundation
230 East Ohio Street, Suite 200
Indianapolis, IN 46204

COMBINED 2005 DISTRICT REPORT, 2007 PRO BONO GRANT APPLICATION, AND 2007 PLAN

Pro Bono District 3

Applicant: Judith Whitelock

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Judicial Appointee: David J. Avery

Plan Administrator: Judith Whitelock

Names of Counties served: Allen, Adams, DeKalb, Huntington, LaGrange, Noble, Steuben, Wells, and Whitley

Percentage of volunteer attorneys (as defined on page 3) who accepted a pro bono case in 2005 per registered attorneys in district, i.e. the district's pro bono participation rate 16%

To the extent the pro bono participation rate information is available by county, please provide below.

Adams	4%	Huntington	11%	Steuben	14%
Allen	17%	LaGrange	8%	Wells	21%
DeKalb	16%	Noble	7%	Whitley	9%

Number of potential clients requesting help in 2005 (limit this to actual intake done or sessions in which plan administrator or his/her delegate provided more than minimal assistance): 1386

Amount of grant received for 2006: \$49,000

Amount of grant (2006 & prior years) projected to be unused as of 12/31/06: none

Amount requested for 2007: \$105,170

One supplemental, explanatory page may be added to the end of this report and plan.

2007 PLAN SUMMARY

1. Please write a brief summary of the 2007 grant request. Please include information regarding your district's planned activities including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion. The grant request should cover needs to be addressed, methods, target audience, anticipated outcomes, and how past difficulties will be addressed.

Planned activities

- Referral of clients to individual attorneys for direct representation.
- Expansion of the volunteer lawyer panel of attorneys for direct representation.
- Development of a program for mediation/arbitration for unrepresented individuals in the family law area to deal with issues of parenting time, support, etc. in cooperation with family law practitioners.
- Participation in Talk To A Lawyer Today with increased local publicity and information.
- Continuation of the assisted pro se clinic program for dissolutions.
- Cooperation with social service agencies by assisting their eligible clients with legal matters.
- Institution of a brief advice service during intake periods.
- Continuation of the regular brief advice/legal questions program on a weekly basis.
- Recognition event for all participating attorneys and paralegals.
- Participation with the District 3 and Allen County Bar Association pro bono committees.
- Continue term as a liaison to the ABA Standing Committee on Pro Bono and Public Service.
- Continuation of presentations on the VLP to community agencies and groups.
- Develop a closer working relationship with other legal services providers in the area.
- Develop a training process and recruit attorney volunteers to assist with short-term limited services in the appropriate family law areas.

Needs to be addressed:

- Number of requests for assistance in family law area and the vast unmet need.
- Continuing economic pressure in area resulting in more eligible persons.
- Additional staff person to expand work of the program.

Methods:

- Continue to increase volunteer participation.
- Plan and institute mediation/arbitration program.
- Plan and institute the training and recruitment process for the limited services program in cooperation with the Family Law section of the Allen County Bar Association.
- Plan an event to honor and recognize those in District 3 who participated in VLP programs.
- Utilize attorneys able to contribute limited time for brief advice services.

Target audience:

- The legal community of District 3.
- The limited income residents of District 3.

Anticipated outcomes:

- Increased participation by attorneys and paralegals
- Successful resolution of legal matters for the limited income residents of District 3.
- Expansion of the program's services in the bankruptcy and family law programs.

How past difficulties will be addressed:

- Continue to increase efficiency in handling clients and referrals.
- Continue to develop additional funding sources.
- Add staff as soon as funds are available.

2005 REPORT OF VOLUNTEER ATTORNEY CASES IN DISTRICT 3

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 3A. Please list each attorney only once in the volunteer attorney column but complete one line for each pro bono case for that attorney.

Definitions

Case: A legal matter referred to and accepted by a pro bono attorney volunteer. This includes mediation and GAL services.

Volunteer Attorney: An attorney who has rendered pro bono service to at least one low-income client during the year or accepted a pro bono referral from the identified program. This does not include attorneys who are on the list of pro bono volunteers but who have never taken a case. The case numbers do not include cases screened, only cases actually referred to a pro bono attorney. This also includes an attorney who has worked solely on a pending pro bono case that was neither opened nor closed during the reporting year.

Case Type: Please use the abbreviations listed in Indiana Supreme Court Administrative Rule 8(B)(3) or any other defined abbreviation.

Name of Pro Bono Provider (includes legal service provider, court, plan administrator, bar association, and other organizations): Volunteer Lawyer Program of Northeast Indiana, Inc.

IOLTA funding accounts for 69.8 % of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding 69.8%.

If this percentage is substantially more than the percentage of IOLTA funding, please explain.

Volunteer Attorney Name	County	Number of new cases accepted/opened in 2005	Number of cases closed in 2005	Number of cases pending in 2005 that were neither opened nor closed in 2005	Number of hours for cases closed in 2005 (column 4)	Case Type
Volunteer 1	Allen	2				MI
Volunteer 3	Allen		1		2	GU
	Allen	1	1		2	MI
Volunteer 5	Allen		1		15	BK
	Allen	3				BK
Volunteer 7	Allen			1		DR
Volunteer 8	Allen			1		MI
Volunteer 11	Wells			1		MI
Volunteer 14	Allen		2		1.5	MI
Volunteer 18	Allen	1	1		4	MI
Volunteer 19	Wells			1		DR
		4	3		12.2	DR
Volunteer 20	Allen		1		1	MI
	Allen	1	1		1.5	MI
TOTAL:	<i>No total needed</i>	TOTAL:	TOTAL:	TOTAL:	TOTAL:	<i>No total needed</i>
List continues next page.		181	209	30	1699.34	

Volunteer 22	Allen		1		30	AD
Volunteer 23	Allen			4		BK
Volunteer 24	Allen		1		8	DR
Volunteer 27	Allen	1				MI
Volunteer 28	Allen		1		10	SC
	Allen	1	1		8.5	SC
Volunteer 30	Allen		1		2	DR
	Allen	1				DR
Volunteer 31	Allen		1		2	GU
Volunteer 32	Allen	4	4		6.4	MH
Volunteer 34	Allen		1		25.7	NU
Volunteer 35	Huntington		2		25	DR
	Huntington	1				DR
Volunteer 39	Allen	3	3		4.75	MH
Volunteer 40	DeKalb	1	1		2	SC
	DeKalb	1				SC
Volunteer 41	Allen	2				SC
Volunteer 42	Wells		1		11.3	DR
Volunteer 43	Steuben		2		73.6	DR
Volunteer 45	Allen	2				MI
Volunteer 47	Allen	7	7		8	MH
Volunteer 48	Allen	2	2		7	BK
	Allen	1	1		10	MF
	Allen	1	1		10	SC
Volunteer 50	Allen	2	2		11	DR
	Allen	1				DR
Volunteer 51	DeKalb	3	3		33.4	DR
Volunteer 52	Wells		1		2	DR
	Wells	2	1		1	DR
Volunteer 56	Allen		2		11	PL
	Allen	1				SC
Volunteer 59	Allen		1		70	DR
	Allen		1		9.4	DR
	Allen	4	4		3.25	MH
Volunteer 61	Allen			1		DR
	Allen		1		2.5	DR
	Allen	1	1		2	SC
Volunteer 64	Allen		1		2	PL
	Allen	1	1		2	MI
Volunteer 67	Allen		1		6.85	DR
	Allen	1	1		1	DR
	Allen	1				DR
Volunteer 70	Steuben	1				SC
Volunteer 71	Allen	2	2		2.25	MH
Volunteer 72	Allen		1		6.25	MI
Volunteer 78	Allen	4	4		7.75	MH
Volunteer 79	Allen		1		7	MI

Volunteer 80	Allen	1				MI
Volunteer 81	Allen	1				MI
Volunteer 83	Allen			1		GU
Volunteer 86	Allen		1		2	DR
	Allen	1				DR
Volunteer 87	Allen		1		6	DR
	Noble	1				DR
Volunteer 88	Allen	1	1		5	MI
	Allen	1	1		15	GU
	Allen	1				DR
Volunteer 91	Allen		1		20	PL
	Allen	1	1		4	MI
Volunteer 92	Allen		4		15	BK
	Allen	1				BK
Volunteer 103	Allen	1				BK
Volunteer 104	Allen	3	3		5	MH
Volunteer 105	Allen	1	1		86.5	DR
	Allen	6	6		7	MH
Volunteer 106	Allen		1		4	MI
Volunteer 109	Allen			1		GU
Volunteer 110	Allen			2		DR
	Allen			1		GU
	Allen	1				DR
Volunteer 111	Allen		1		11	DR
	Allen	1				DR
Volunteer 114	Allen			1		DR
Volunteer 115	Allen		1		34	DR
Volunteer 116	Allen	1				DR
Volunteer 117	Allen		1		56.55	DR
Volunteer 118	Adams	1	1		8	DR
Volunteer 119	Allen		1		2.5	BK
	Allen	1				DR
Volunteer 121	Allen	1				SC
Volunteer 122	Allen	2	2		2.5	MH
Volunteer 123	Allen		1		1	ES
Volunteer 124	Whitley	1				SC
Volunteer 125	Allen		1		20	MI
Volunteer 126	Allen			2		BK
	Allen		2		6.8	BK
	Allen	2				BK
Volunteer 127	Allen		1		2	PL
	Allen	2	1		1	SC
Volunteer 128	DeKalb		1		71.48	DR
	DeKalb		1			DR
	DeKalb	2	1		10.5	DR
Volunteer 133	Allen			1		GU
Volunteer 134	Allen	2	2		13	BK
Volunteer 137	Allen		1		11	GU

Volunteer 138	Allen	2	2		3	SC
	Allen	3	3		4.75	MH
Volunteer 140	Steuben		1		25	DR
Volunteer 143	Allen		1		50	MI
	Allen		1			MI
	Allen	1	1		2.5	MI
Volunteer 145	Huntington	1	1		2.2	DR
Volunteer 147	Allen			1		JP
Volunteer 149	Allen		1		5	MI
Volunteer 150	Allen		1		2.6	DR
	Allen	2				DR
Volunteer 151	Allen	1				DR
Volunteer 152	Steuben		2		22.3	DR
	Steuben		1		2	BK
	Steuben	2	1		8.7	DR
Volunteer 154	Allen		2		29	BK
	Allen			1		BK
Volunteer 157	Whitley	1	1		2.2	DR
Volunteer 158	Allen		1		5.5	BK
	Allen	1	1		2.5	BK
Volunteer 159	Allen		1		62.78	MI
	Allen			1		MI
Volunteer 160	Allen			1		PL
	Allen	1				SC
Volunteer 162	Allen	1	1		1	BK
Volunteer 164	Huntington		1		8.15	DR
	Huntington		1		10.5	SC
	Huntington	1				AD
	Huntington	1				DR
Volunteer 167	Huntington	1	1		4.7	DR
Volunteer 168	LaGrange		1		5	BK
	DeKalb	1	1		4	MF
Volunteer 169	Allen			1		MI
Volunteer 170	Allen		1		40	DR
Volunteer 171	Allen			2		SC
	Allen	1				SC
Volunteer 172	Wells		1		8	DR
Volunteer 177	Allen	1	1		3	MI
Volunteer 179	Allen	5	5		4.25	MH
Volunteer 180	Allen		1		3.7	MI
	Allen	1				SC
Volunteer 181	Allen	1				DR
Volunteer 182	DeKalb	1	1		42.2	DR
Volunteer 183	Allen			1		BK
	Allen	1	1		1	BK
Volunteer 184	Allen	1				DR
Volunteer 186	Allen		1		3	SC
	Allen	1				SC

Volunteer 188	Allen		1		15	MI
Volunteer 189	Allen	1				DR
	Allen	5	5		6.25	MH
Volunteer 190	Allen	1				BK
Volunteer 191	Allen		2		11	DR
Volunteer 193	Allen		1		8.05	MI
	Allen	1	1		1	MI
Volunteer 194	Allen		2		18.5	SC
	Allen	1	1		1.5	SC
Volunteer 196	Allen		1		10	MI
	Allen		1		3	SC
	Allen	1	1		2	MI
Volunteer 197	Allen		2		7.5	BK
Volunteer 198	Allen	1	1		1	BK
Volunteer 203	Allen	5	5		5.75	MH
Volunteer 205	Allen			2		BK
	Allen	1				BK
	Allen		1		12	MF
Volunteer 206	Steuben	2				DR
Volunteer 209	Allen	2	2		2.25	MH
Volunteer 210	Allen		1		4.5	BK
	Allen	1				BK
Volunteer 213	DeKalb		1		10	DR
	DeKalb	1				DR
Volunteer 214	Allen		1		8.4	DR
	Allen	1				DR
Volunteer 215	Allen		1		2	MI
	Allen		1		11	DR
Volunteer 217	Allen			1		MI
	Allen	1				MI
Volunteer 218	Allen	1				MI
Volunteer 219	Allen	1				BK
	Allen	2	2		4	DR
Volunteer 222	Allen		1		37.85	DR
	Allen		1		143.13	DR
	Allen	1				DR
Volunteer 223	Allen	1	1		2	DR
Volunteer 224	Allen	1	1		1	SC
Volunteer 226	Allen		1		1	GU
	Allen	1	1		1	GU
Volunteer 227	Allen		2		40.35	DR
	Allen	1				JP
Volunteer 228	Allen		1		4	BK
	Allen	1				BK
Volunteer 229	Allen	1				DR
Volunteer 230	Allen		2		21.5	BK
	Allen			1		MI
	Allen	1	1		1	BK

	Allen	1	1		11.4	MI
Volunteer 235	Allen	6	6		7.75	MH
Volunteer 236	Allen		1		4.6	MI
	Allen	1	1		5.6	GU
Volunteer 237	Allen	1				BK
Volunteer 239	Allen		1		2	AD
Volunteer 240	Allen		1		15	DR
	Allen	1				DR
Volunteer 242	Noble		1		2	MI

Name of Pro Bono Provider (includes legal service provider, court, plan administrator, bar association, and other organizations): none

IOLTA funding accounts for ____ % of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding _____. If this percentage is substantially more than the percentage of IOLTA funding, please explain.

[illegible]

2005 REPORT OF VOLUNTEER ATTORNEY LIMITED INFORMATION ACTIVITY IN DISTRICT 3

This limited legal information chart can include activities such as pro se clinics and call-in or walk-in informational services.

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 4A. Please list each attorney only once in the volunteer attorney column but complete one line for each type of legal information activity for that attorney.

Name of Pro Bono Provider (includes legal service provider, court, plan administrator, bar association, and other organizations): Volunteer Lawyer Program of Northeast Indiana, Inc.

Volunteer Attorney Name	County	Type of Activity	Number of Hours
Volunteer 5	Allen	TTALT	2
Volunteer 6	Allen	TTALT	2
Volunteer 8	Allen	TTALT	2
Volunteer 16	Allen	TTALT	2
Volunteer 21	Allen	TTALT	2
Volunteer 32	Allen	Legal Line	2
Volunteer 50	Allen	Legal Line	2
Volunteer 51	DeKalb	TTALT	2
Volunteer 60	Allen	TTALT	2
Volunteer 61	Allen	TTALT	2
Volunteer 62	Allen	Legal Line	6
Volunteer 65	Allen	Legal Line	2
Volunteer 68	Allen	TTALT	2
Volunteer 76	Allen	Pro bono ProTem service	117
Volunteer 78	Allen	TTALT	2
Volunteer 79	Allen	TTALT	2
Volunteer 85	Allen	Legal Line	8
Volunteer 89	Allen	TTALT	2
Volunteer 96	Allen	TTALT	2
	Allen	Pro Se Clinics	8
Volunteer 97	Allen	Legal Line	2
Volunteer 98	Allen	TTALT	2
Volunteer 106	Allen	TTALT	2
Volunteer 112	Allen	TTALT	2
Volunteer 120	Allen	Legal Line	4
Volunteer 126	Allen	TTALT	2
Volunteer 127	Allen	TTALT	2
Volunteer 138	Allen	TTALT	2
	Allen	Legal Line	6
Volunteer 141	Allen	Legal Line	6
Volunteer 149	Allen	TTALT	2

Volunteer 152	Steuben	TTALT	2
Volunteer 165	Allen	TTALT	2
Volunteer 171	Allen	TTALT	2
Volunteer 173	Allen	Legal Line	2
Volunteer 178	Allen	TTALT	2
Volunteer 179	Allen	TTALT	2
Volunteer 190	Allen	TTALT	2
Volunteer 194	Allen	TTALT	2
Volunteer 201	Allen	TTALT	2
Volunteer 204	Allen	Legal Line	2
Volunteer 205	Allen	TTALT	2
Volunteer 207	Allen	Legal Line	4
Volunteer 208	Allen	Legal Line	2
Volunteer 217	Allen	TTALT	2
Volunteer 220	Allen	Legal Line	6
Volunteer 222	Allen	TTALT	2
	Allen	Legal Line	4
Volunteer 229	Allen	TTALT	2
	Allen	Legal Line	2
Volunteer 232	Allen	TTALT	2
Volunteer 240	Allen	TTALT	2
TOTAL:			TOTAL: 253
OVERALL VOLUNTEER ATTORNEY TOTAL:	162		OVERALL HOURS TOTAL: 1952.34

Name of Pro Bono Provider (includes legal service provider, court, plan administrator, bar association, and other organizations): none

[illegible]

2005 REPORT

Please list your District's 2005 activities--including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion--in chronological order.

<u>Date</u>	<u>Activity</u>
January 11	Talk To A Lawyer Today CLE video
January 12	EJC – Beyond the Basics Design Team conference call
January 17	Talk To A Lawyer Today – all day event Two television and one radio interview during the event.
January 24	VLP Board of Directors meeting National Assoc of Pro Bono Professionals (NAPBPro) conference call (plan adm is president)
February 10	VLP Recognition Event speaker dinner with judicial appointee and board members
February 11	VLP Recognition Event
February 16	ACBA Family Law Section CLE
February 18	ACBA Bench-Bar Conference
March 8	NAPBPro executive committee conference call
March 22	ACPL Non-profit center – GO! Series program
April 19	ISBA Pro Bono Comm-Recognition sub-committee conference call
April 25	VLP Board of Directors meeting
May 2	ACBA Pro Bono Committee
April 3 – 7	ABA Equal Justice Conference – Austin
April 10	IN Pro Bono Commission meeting presentation - Indianapolis
May 29	Presentation on VLP to meeting of local social service agency representatives
June 15	Pro Se Clinic
July 9	VLP booth at the ACBA Family Event at the 3 Rivers Festival
July 13	Pro Se Clinic
July 25	VLP Board of Directors meeting
August 8	ABA Pro Bono Publico Award Winners Reception & Lunch at ABA Convention – Chicago honoring J. Philip Burt, Esq., one of the winners. Organized the trip for 20 people from Fort Wayne. There were numerous articles in various publications about Mr. Burt and his pro bono work.
August 10	ABA Pro Bono EJC Design Team meeting – Chicago
August 28	NAPBPro Executive Committee conference call
September 24-26	ABA Pro Bono Committee Meeting – Seattle
September 29	City of Fort Wayne – day long resource fair for Katrina Evacuees
Sept 30 – Oct 1	NAPBPro Midyear Meeting - Chicago
October 21	Plan Administrators' Retreat & Shepard Awards Dinner – Indianapolis
October 22	Indiana Lawyer – article for Allen County Focus section
October 24	VLP Board of Directors
October 26	EJC Pro Bono Working Group conference call
November 8	ABA Pro Bono Committee – Pro Bono Publico Awards subcommittee conference call
December 2	Introduction to Pro Bono in Allen County CLE presentation with Judge Lee and others
December 20	ACBA Applied Professionalism Program presentation on pro bono with Judge Lee

2005 REPORT

Please provide a short summary of how the provision of pro bono service is coordinated in your district, including the intake process, the relationships of pro bono providers in the district, how referrals are made, and how reporting is done.

Coordination of pro bono service in the district

There continue to be several sources of pro bono assistance in District 3. The VLP of Northeast Indiana provides services by the attorneys in private practice who have volunteered to offer legal representation to those who meet the financial eligibility requirements. The Fort Wayne office of Indiana Legal Services has staff attorneys who accept clients according to their program priorities. Legal Services of Maumee Valley has staff and contract attorneys who do the same. The Allen County Bar Association has a pro bono committee and there is a District 3 Pro Bono committee. All the programs participate on both committees. Each program routinely refers callers to the provider who best meets their needs.

Intake Process

VLP telephone intakes are accepted Mondays through Thursdays from 9:00 am to 11:00 am. Callers are first screened for problem and financial eligibility, then details of the legal issue are gathered. Ineligible callers, either because of the nature of the problem, financial circumstances, or location of a pending case are given other resource information. VLP also receives intakes from social service providers whose clients have legal issues and needs.

Relationship of Pro Bono Providers

All providers are represented on the ACBA Pro Bono Committee, the District 3 Pro Bono Committee and on the board of directors of the Volunteer Lawyer Program of Northeast Indiana, Inc. We do not have "competing" programs, nor do we seek funding from the same sources.

VLP Referrals

After the initial assessment of eligibility, the client is asked to provide additional information on the matter and to sign a retainer agreement. Further review is then done to determine the potential for placement and the appropriate placement. Referrals to private attorneys for initial consultation and possible direct representation are made by sending a memo with the names of all parties and type of matter so that conflict, scheduling, etc. can be checked by the attorney. A letter is then sent to the client with the attorney information and instructions to contact the attorney for an appointment.

VLP Reporting

Case initial acceptance and case closing forms are sent to the attorney with the case materials. Additionally, periodic "Case Update" reports are sent to each attorney with an open case. Attorneys are requested to report the results of each case and the hours spent on representation.

Other VLP programs

VLP also offers a call-in opportunity, staffed by volunteer attorneys, every Tuesday evening, called Legal Line. Callers receive advice and answers to their legal questions, plus information on available resources. VLP attorneys provide representation for petitioners in mental health commitment cases on a rotating basis each week as they are needed at those hearings. VLP sponsors the annual Talk To A Lawyer Today event on Martin Luther King Day. The level of participation is high, with all the available attorney slots filled and strong support by the paralegals of the area during the day.

The executive director of the VLP began her two-year term as a liaison to the ABA Pro Bono Committee in August of 2005, served on the ABA Equal Justice Conference Design Team and as president of the National Association of Pro Bono Professionals. She continues to present information on VLP and its activities to community groups.

Please describe any special circumstances, including difficulties encountered, affecting your District's 2005 implementation of its plan.

More volunteers, financial resources and staff assistance time are needed.

BUDGETS for 2005, 2006 and 2007

Income Category	2005 Actual Income	2005 Budget	2006 Actual Income To Date	2006 Budget	2007 Budget
A. INCOME	-	-	-	-	-
1. IOLTA Grant Amount	44,000	44,000	49,000	49,000	105,170
Other Income: <i>Explain source(s) and if Actual/Expected in narrative</i>					
2.Foundation grants	6,000	18,000	0	15,000	10,000
3.Individual donations	12,147	17,935	290	16,000	10,000
4.Special event	850	0	360	0	0
5. Total Income (sum of lines A1 - A4)	62,997	79,935	49,650	80,000	125,170
Expense Category	2005 Actual Expenditures	2005 Budget	2006 Actual Expenditures To Date	2006 Budget	2007 Budget
B. PERSONNEL EXPENDITURES					
1. Plan Administrator	32,885	28,500	21,713	29,925	31,420
2. Paralegals					26,000
3. Others - Please explain					
4. Employee benefits					
a. Insurance	Included above	10,500	Inc. above	11,000	25,225
b. Retirement plans					
c. Other – Parking	0	0	0	840	1,800
5. Total Personnel expenditures (sum of lines B1 - B4c)	32,885	39,000	21,713	41,765	84,445
C. NON-PERSONNEL EXPENDITURES					
1. Occupancy	27,000	27,000	12,000	24,000	24,000
2. Equipment Rental					
3. Office Supplies	1,223	3,300	357	3,350	3,500
4. Telephone	769	600	262	700	900
5. Travel		400		400	400
6. Training		1,200		1,500	1,500
7. Library					
8. Malpractice Insurance	975	1,200	975	1,200	1,200
9. Dues and Fees	216	175	160	200	225
10. Contingent Reserve					
11. Litigation Reserve					
12. Marketing and promotion					
13. Attorney recognition	2,206	2,500		2,500	2,500
14. Litigation expenditures					
15. Property Acquisition					
16. Contract Services		3,000	405	2,500	2,500

17. Grants to other pro bono providers					
18. Other - Please explain	954	1,200	1,394	2,200	4,000
19. Total Non-Personnel Expenditures (sum of lines C1 - C18)	33,343	40,575	15,553	38,550	40,725
D. TOTAL EXPENDITURES (sum of B5 & C19)	66,228	79,575	37,266	80,315	125,170
E. ENDING FUND BALANCE (A5 less D)	(3,231)	0	12,384	(315)	0

Budget Narrative

Please provide descriptions of the following line items in the foregoing budget chart, by item number, in the space provided. Please explain any other budget entries that are not self-explanatory, including other sources of income.

Lines (A)(1), (2), (3), (4) Please indicate the number of hours per week for each personnel position, rate of pay, and all employee benefits.

Line B. 1. 32 hours a week plus additional as required for clinics, meetings, seminars and additional work at home. Salary is an annual salary. Benefits are health insurance and parking. Benefit line includes employer's payroll taxes.

Line B. 1 – NOTE - The 2005 and 2006 Actual Expenses column includes salary and benefits as a total only as they are handled by a human resources firm and not broken out on the invoice.

The plan administrator is currently a liaison to the ABA Standing Committee on Pro Bono & Public Service and attends all those meetings.

Line B. 2. 40 hours a week. Salary is an annual salary. Benefits are health insurance and parking. Benefit line includes employer's payroll taxes.

Line (B)(1) Please describe the occupancy cost in terms of square footage, utilities or other amenities and indicate whether the occupancy cost is above or below the market rate for that space.

The occupancy cost includes full-time receptionist service, runner service as needed (shared with the other in the complex). The receptionist is available and utilized for a number of VLP tasks. All utilities are included – gas, electric, water, and local phone service. Other amenities include phone system, copiers, fax services, file cabinets, use of all common areas and furnishings for those areas including lobby, conference rooms, work room, kitchen, and space and furnishings for an assistant.. Also included are interior and exterior maintenance, cleaning services and snow removal.

Occupancy cost as related to market rate – the owner has leased the space to VLP at a reduced rate compared to market value, in addition to generously accommodating special events such as VLP Board meetings, Talk To A Lawyer Today (which used all the conference rooms in this building and another building a block away also owned by him).

Line (C) (3)

Basic office supplies have been donated since the beginning of the program; however that is not anticipated to continue any longer.

Line (C) (4)

Telephone charges for long distance and directory listing only.

Line (C) (18)

Includes equipment repairs, bank service charges, a special event cost.

ANNUAL TIMETABLE FOR SUBMISSION OF FORMS AND CHECKS:

January 1:	Checks distributed
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
December 1:	IBF grant agreement due and revised budget due

The following representations, made to the best of our knowledge and belief, are being provided to the Indiana Pro Bono Commission and Indiana Bar Foundation in anticipation of their review and evaluation of our funding request and our commitment and value to our Pro Bono District.

Operation under Rule 6.6

In submitting this application for funding, this district is representing itself as having a Pro Bono Plan, which is pursuant to **Rule 6.6** of the Indiana Rules of Professional Conduct. The plan enables attorneys in our district to discharge their professional responsibilities to provide civil legal pro bono services; improves the overall delivery of civil legal services to persons of limited means by facilitating the integration and coordination of services provided by pro bono organizations and other legal assistance organizations in our district; and ensures access to high quality and timely pro bono civil legal services for persons of limited means by (1) fostering the development of new civil legal pro bono programs where needed and (2) supporting and improving the quality of existing civil legal pro bono programs. The plan also fosters the growth of a public service culture within the district which values civil legal pro bono publico service and promotes the ongoing development of financial and other resources for civil legal pro bono organizations.

We have adhered to **Rule 6.6** (f) by having a district pro bono committee composed of:

- A. the judge designated by the Supreme Court to preside;
- B. to the extent feasible, one or more representatives from each voluntary bar association in the district, one representative from each pro bono and legal assistance provider in the district, and one representative from each law school in the district; and
- C. at least two (2) community-at-large representatives, one of whom shall be a present or past recipient of pro bono publico legal services.

We have determined the governance of our district pro bono committee as well as the terms of service of our members. Replacement and succession members are appointed by the judge designated by the Supreme Court.

Pursuant to **Rule 6.6** (g) to ensure an active and effective district pro bono program, we:

- A. prepare in written form, on an annual basis, a district pro bono plan, including any county sub-plans if appropriate, after evaluating the needs of the district and making a determination of presently available pro bono services;
- B. select and employ a plan administrator to provide the necessary coordination and administrative support for the district pro bono committee;
- C. implement the district pro bono plan and monitor its results; and
- D. submit an annual report to the Commission.

Commitment to Pro Bono Program Excellence

We also understand that ultimately the measure of success for a civil legal services program, whether a staffed or volunteer attorney program, is the outcomes achieved for clients, and the relationship of these outcomes to clients' most critical legal needs. We agree to strive for the following hallmarks which are characteristics enhancing a pro bono program's ability to succeed in providing effective services addressing clients' critical needs.

- 1. Participation by the local bar associations and attorneys.** The associations and attorneys believe the program is necessary and beneficial.
- 2. Centrality of client needs.** The mission of the program is to provide high quality free civil legal services to low-income persons through volunteer attorneys. Client needs drive the program, balanced by the nature and quantity of resources available.
- 3. Program priorities.** The program engages in a priority-setting process, which determines what types of problems the program will address. Resources are allocated to matters of greatest impact on the client and are susceptible to civil legal resolution. The program calls on civil legal providers and other programs serving low-income people to assist in this process.
- 4. Direct representation component.** The core of the program is direct representation in which volunteer attorneys engage in advocacy on behalf of low-income persons. Adjunct programs such as advice clinics, pro se clinics and paralegal assistance are dictated by client needs and support the core program.
- 5. Coordination with state and local civil legal providers and bar associations.** The programs work cooperatively with the local civil legal providers. The partnerships between the civil legal providers and the local bar association results in a variety of benefits including sharing of expertise, coordination of services, and creative solutions to problems faced by the client community.
- 6. Accountability.** The program has mechanisms for evaluating the quality of service it provides. It expects and obtains reporting from participating attorneys concerning the progress/outcome of referred cases. It has the capability to demonstrate compliance with requirements imposed by its funding source(s), and it has a grievance procedure for the internal resolution of disputes between attorneys and clients.
- 7. Continuity.** The program has a form of governance, which ensures the program will survive changes in bar leadership, and has operational guidelines, which enable the program to survive a change in staff.
- 8. Cost-effectiveness.** The program maximizes the level of high quality civil legal services it provides in relationship to the total amount of funding received.

9. Minimization of barriers. The program addresses in a deliberate manner linguistic, sensory, physical and cultural barriers to clients' ability to receive services from the program. The program does not create undue administrative barriers to client access.

10. Understanding of ethical considerations. The program operates in a way which is consistent with the Rules of Professional Conduct; client confidentiality is assured and conflicts of interest are avoided. The staff and volunteers are respectful of clients and sensitive to their needs.

11. ABA Standards. The program is designed to be as consistent with the ABA Standards for Programs Providing Civil Pro Bono Legal Services to Persons of Limited Means as possible.

No events, shortages or irregularities have occurred and no facts have been discovered which would make the financial statements provided to you materially inaccurate or misleading. To our knowledge there is nothing reflecting unfavorably upon the honesty or integrity of members of our organization. We have accounted for all known or anticipated operating revenue and expense in preparing our funding request.

We agree to provide human-interest stories promoting Pro Bono activities in a timely manner upon request of the Indiana Bar Foundation or Indiana Pro Bono Commission. We further agree to make ourselves available to meet with the Pro Bono Commission and/or the Indiana Bar Foundation to answer any questions or provide any material requested which serves as verification/source documentation for the submitted information.

Explanation of items stricken from the above Letter of Representation:

It is understood that this Letter does not replace the Grant Agreement or other documents required by the Indiana Bar Foundation or Indiana Pro Bono Commission.

Signatures:

Judicial Appointee Signature

Date

Plan Administrator Signature

Date